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ABSTRACT

Described in this technical note is a 2-week workshop designed to train Indonesian community education workers (peniliks) to develop and use case studies in their work with village learning groups. The peniliks are described as mostly male, from a variety of backgrounds, but with backgrounds similar to that of their clients. Learning groups are defined as usually made up of 10 people who have come together to learn a particular subject. Using the definition that "a case study is a description of something that really happened," the document describes how the workshop approaches teaching the case study method to peniliks so that they will not only have new skills to use in their work, but will also see villagers as a valuable resource. The use of the case study to gather, organize, and analyze information is emphasized. An already existing model, "The Ten Characteristics of Learning," is used as the outline for preparing case studies. After classroom work involving small groups and brainstorming is completed, the report follows the peniliks to a village where they use new interviewing skills to acquire information for case studies; individual case studies are critiqued upon return to the training center. Program advantages and disadvantages are listed. (BRR)

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TECHNICAL NOTE NO. 16

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FIELD TRAINING THROUGH CASE STUDIES

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NOTE WRITTEN BY: JOHN PONTIUS with YAHYA YAKUB

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SUMMARY: This note describes a training technique which is useful in preparing fieldworkers who need skills in training, research, and evaluation. The technique was developed during the training of Indonesian Community education workers, and uses activities in which trainees write case studies while practicing participatory training techniques and research methods.

TECHNICAL NOTES

This note is part of a series of Technical Notes based on the experience of staff members working with PENMAS, the Directorate of Community Education of the Ministry of Education in Indonesia, and with The Center for International Education at the University of Massachusetts. The two organizations have been working together on a project financed by the government of Indonesia, in part with a loan from the World Bank.

Each note focuses on a particular learning material, training technique, or issue which grew out of the experience of developing a large-scale, national nonformal education program in Indonesia. The notes contain whatever information was available at the time of writing. They present a summary of experience in the hopes that it will be of value to others struggling with similar problems in different settings. The notes represent work in progress and are not intended in any way to be evaluations, although care is taken to present whatever evaluation information is available on the effectiveness of the particular method being discussed. They are intended to be self-contained so that practitioners can immediately adapt them to use in their own settings.

As in all such projects, many people contribute directly and indirectly to the development of methods. The notes attempt to accurately credit those most directly involved, but invariably there are contributors who go unrecognized, particularly in a project which encourages participation at all levels. Throughout the five year period of collaboration there has been a pattern of extensive bi-national effort.

We encourage readers to share with us their reactions and particularly relevant similar experiences which they may have had in other settings. The notes are available in English from The Center for International Education, and will also be available in Bahasa Indonesian from both the Center and from PENMAS. Notes will be issued periodically as experience produces approaches which we feel would be of interest to other practitioners.

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Introduction

The training activity described in this Technical Note is our solution to a problem which confronted us as trainers of community education fieldworkers. We were required to develop a training design for a two week workshop that would meet fieldworkers' needs and prepare them in several competency areas that were completely new to them. The objective was to design a training workshop that would introduce fieldworkers to participatory education concepts and methods, prepare them to do learning needs assessments, inspire and enable them to use participatory learning activities, help them to better understand what learning groups are and how they can be formed, prepare trainees to be able to apply evaluation procedures in the field, and improve their abilities to collect data.

We decided to divide our workshop into three parts. The first part would be an introduction to NFE methods and concepts which would lay a foundation for further training. The second part of the training would be a field-based practicum where trainees would be able to apply their classroom knowledge to field situations. The third part of the workshop would expand upon the first two. The second part of the training was found to be the most useful and was where we used the training method which is the focus of this Technical Note.

During the second part of our field worker training we decided to center the training around a process of writing case studies on village learning groups. Indeed, our stated purpose of this training stage was the production of case studies, but we also hoped that the process of preparing case studies would reinforce other segments of the training. The objectives for the case study methodology included:

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*The authors wish to express their thanks to Bapak Abdul Wahab, Head of the Penmas Center in South Sulawesi and his staff for their willingness to try new training activities. Without their support and hard work, this Technical Note could not have been written.

At the end of the activity participants will have

1. Written a case study;
2. Experienced participatory training activities;
3. Developed criteria for evaluative purposes;
4. Written and used questionnaires in field research;
5. Observed community education activities in an area other than their own district.

The case study activity was also planned to give fieldworkers a different perspective of villagers. Fieldworkers would have an opportunity of seeing villagers not just as a "target population", but also as a valuable resource that could help the fieldworkers in their work. Thus we chose to use an activity that stressed process as much as product and which would utilize village learners in a resource role.

Indonesian Background

PENMAS programs at the sub-district level, the lowest administrative level of PENMAS, are supervised by the penilik, or fieldworker. He or she is responsible for the bringing together of potential learners with a facilitator/tutor and thereby forming learning groups at the village level. Peniliks are also responsible for: providing learning materials to the learning groups; training facilitators in participatory education techniques; reporting on field activities to their supervisors; and carrying out formative evaluation activities to help improve the learning groups in the sub-district.

Peniliks generally have no more than a secondary education, and often less. Mostly male, PENMAS peniliks come from a variety of backgrounds and usually are similar in background to that of their clients.

Learning groups are usually made up of 10 people who have come together to learn a particular subject. They may choose to focus on literacy and numeracy, carpentry, farming skills, sewing, and/or a variety of other knowledge/skill areas which the penilik will support by providing learning materials, seeking neighborhood support, and finding a tutor who can help the learners in specific skill areas. Rarely do peniliks act as a tutors. Their job is one of facilitating the formation of the group, preparing tutors and learning materials, and providing other necessary support.

What is a Case Study?

A case study is a description of something that really happened. It is used to increase our understanding of what happened and how it happend. A case study is usually a written document. These are the components of the definition which we stressed initially with the trainees. We tried to impress upon them that the case study could be a source of knowledge for others and could be used as learning material and a resource for training activities like the use of critical incidents or in role playing.

How did we use the case study? We took the process of what one must go through in order to write a case study, broke it down into three basic segments, each of which has a product, and helped the fieldworkers through the process. We will cover more about the process of the case study activity later. What we wish to emphasize is that we were generally more interested in the process of how to write a case study and how we might use that process to support other training objectives than we were interested in the quality of the product itself.

In order to clear up any lingering confusion about what a case study is and also to amplify what a learning group is, the following excerpts from an actual case study are offered.

> In February of 1979, the Rose II Learning Group, a literacy learning group, was formed by its tutor Mrs. Rahassa. Ten women formed this group with the intention of becoming literate.
>
> . . . the learners work as vendors of household supplies or as seamstresses . . .
>
> Of the ten ladies that formed the learning group, none has dropped out and there have been no additions. All of the learners live in the same neighborhood and close to the house in which they meet for learning sessions.
>
> The house in which they meet has electricity and the learners are quite happy about that as they can meet in the evenings.
>
> The Rose Group meets for two hours three evenings a week to study reading, writing, and arithmetic. They use the national literacy program booklets . . . , there are opportunities for individual and group work. The group uses letter dice games to help their learning.

There is a support committee which is made up of local government officials and neighborhood leaders. The committee acts as a support group supplying the learning group with the official stature that is necessary for seeking funding and the committee also searches for learning materials for the group.

The tutor is an elementary school teacher who lives in the neighborhood. She is a skilled seamstress. She began working with the Rose Group, for which she receives no payment, after attending a workshop on the role of tutors in literacy training which was presented by the local PENMAS penilik.

For learning materials the group has used the national literacy packet, letter dice, letter flash cards and flannelboard insturctional aids.

The learners think that their learning has been stimulated by the informality of the tutor and the good learning environment that she creates. "She is very funny," was a comment we were given. Another learner said, "I am already able to make use of my learning in my work. I need to keep accounts and now I can write down numbers and keep the accounts in books where they don't get lost."

There nas been a grant by the local women's group of $20.00 to the tutor as an incentive.

No learner has yet completed all of the literacy series but the tutor says that they have been able to master the basics of reading, writing, and arithmetic. . . . The learners are anxious to continue their learning . . . . They want to follow up their literacy learning by learning sewing skills.

The above is only a shortened form of a case study; however, you can get a feeling for what should be in a case study. From this abbreviated form you already have an idea of what the Rose Group is doing as a learning group. More analysis would be good, yet this is a fine first step.

More on Process

We found upon analysis of the process that the writing of a case study has three stages. In stage one the goals and objectives of the case study need to be determined as well as what type of information needs to be included in the case study.

> This is the question stage. The familiar, Who, What, Why, Where, When, and How! We need to know these things before we can write about an experience.

One of our trainers expressed it clearly when he said, "This is the first stage: the question stage. What are we going to write about? What do we need to know to write about this subject? How can we get this information?"

During stage two data is collected and sorted out into a logical pattern. The data can be brought together in any number of ways: library research, from reports, from interviews, etc. This is the collection and ordering stage; we call it taking an inventory of our collected data.

The final stage is perhaps the easiest if the first two have been done well. This is the writing stage. If relevant information has been collected and arranged within a somewhat logical system then the writing is easy; it just tells the story revealed by the collected information.

These three stages form the basics for writing a case study. As the penilik's work concerns learning groups, we thought that the case study should be about learning groups. Given the above stages for writing a case study, the following steps were used to go through the process:

1. Discuss the goal of the activity, what a case study is, and the use of a case study
2. Develop a format for collecting data
3. Collect information
4. Analyze data
5. Write the case study
6. Analyze the case study process

1. Discuss the Case Study and It's Use

In this step fieldworkers and trainers discuss what a case study is and how it can be used.

> In the corner of the cafeteria a group of trainees are gathered in a small discussion group. They have just finished reading a case study and are trying to analyze its contents. "It's just like a story." "Yes, but it isn't just a story, it's different. There is more to it."

Participants get a chance to look at a sample case study and analyze its contents. A good activity at this step is to have trainees read and discuss a case study in small groups. The small groups should then hold a brain-storming session in which they try to list the criteria which they consider necessary for a well-written case study. Following this the groups gather again into one large group and share their criteria with everyone.

2. Develop a Format for Collecting Data

This step and the previous step fit into what we have called the question stage. These two steps help the penilik to see how he could go about beginning to write a case study. During these two steps it is important for the penilik to understand the importance of knowing what it is he wants to write about before he begins.

Once a subject is selected, the next step is to select the proper information for inclusion in the case study. We have used a format particular to PENMAS that serves as an analytical model as well as providing an outline for the case study. This model, The Ten Characteristics of Learning, is particularly appropriate for PENMAS learning groups since it was developed by the PENMAS Directorate as an analytical model for thinking about and examining a learning program. The characteristics and their definitions follow:*

1. The Learning Group. This can be any group of learners, formal or non-formal. A literacy learning group is one type of learning group; a primary class would be another.

2. The Learners. These are the members of the learning group.

3. The Learning Place. This is where the group meets.

4. Learning Activities. This includes not only what is being learned, but what methodology is being used.

5. Support for Learning. This is the support offered to a learning group by its community and the leaders of that community. This could include such groups as a Parent Teachers Association, a neighborhood support committee, an old boy's association, any group that offers encouragement, resources, or aid.

6. Learning Resources. These are the facilitators/tutors and those other sources that might be drawn upon to guide learning activities.

7. Learning Materials. These can be anything from letter dice used in literacy groups to sewing machines used in a skill training group.

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*The Ten Characteristics were authored by Anwas Iskandar and first published in the Directorate bulletin. They now form the outline for PENMAS's evaluation of learning groups.

8. Learning Motivation. This is defined as that which is used to stimulate learning. Learning motivation might include such things as the type of activity used, honors awarded for excellence in learning, community and/or cultural support for learning, etc.

9. Financial Support for Learning. This comprises the financial aid that is given to learning groups and all of the forms that it might take.

10. The Results of Learning. This may mean different things to different people. To the tutor the results of learning might mean how many learners of a literacy group finished their course of study and how well they read. To a learner it might mean how the learning experience has affected her life.

We use the characteristics in this activity because peniliks are familiar with them; because we need a format on which to model the case study and the characteristics can be used in this way; and because we decided to use a questionnaire to collect data, the characteristics provided a basis for a set of questions which could be used to examine a learning group. Other organizations may not have such a stated analytical model, but nearly every community education or community development agency has a philosophy or statement of methods which if examined would provide a similar model that could serve as a basis for writing a case study. It is important that the concepts basic to the model are familiar to the trainees. In the Indonesian setting every penilik is familiar with the Ten Characteristics.

During this step trainees are divided into small working groups and given a characteristic for which the group is asked to develop a set of questions. The answers to these questions will provide information which can be used to describe that characteristic as it applies to a particular learning group. A typical set of questions developed for characteristic number six, "Learning Resources, might include:

1. How many people have acted as resources for this learning group?
2. Who? (Name, age, education, work, addresses)
3. What kind of skills do the resources have?
4. Is there any pay for the resources?
5. Have the resources received any training for their roles?
6. Why did the learners join this learning group?

Each working group lists and discusses its list of questions before all of the participants. After this discussion a questionnaire is drawn up and trainees practice interviewing each other with this questionnaire in role play situations.

3. Collect Information

Trainees go out to a village site and live there for several days. They live there so that they have a chance to get to know the village. At the field site the trainees are divided into several working groups. Each working group is assigned a learning group to study.

> "This village is famous for its langsat (a fruit). The owner of the house where I am sleeping has several langsat trees. Last night he and I ate langsat and discussed how he might market them. Maybe the learning group I am studying could help him."

Working groups conduct interviews with individual learners or the learning group as a whole. This step and the following take the learner through the second stage in the process of writing a case study.

4. Analyze data

This step consists of what might be called taking an inventory of the information collected. All information pertaining to a characteristic is listed under that characteristic. Working groups are asked to consider the information they have collected, to discuss the implications of that information for the planning of future programs, and to discuss what the group feels are the major problems and successes of the learning group under study.

5. Write the Case Study

All of the inventoried information is brought together in a prose description of the learning group which has been studied. Each working group then presents its case study to the rest of the trainees and problems are discussed and possible solutions are suggested. There have been occasions when there has been enough time for the working groups to write out suggestions for the local penilik concerning local problems requiring PENMAS attention and how the penilik might deal with them. This step covers the last stage of the process of writing a case study.

6. Analyze the Case Study Process

During this step the trainers and participants review and discuss the process which they have gone through in order to develop a case study.

Problems that have arisen concerning the process are discussed and suggestions about how to improve the process are asked for at this time.

Although this step does not relate directly to any of the three stages of the case study process, it is important because it consolidates the learning aspects of the process for the trainees. This step is meant as a period of reflection; we try to outline what the trainees have gone through and then trainers and trainees try to explain why the experience was structured in the manner outlined above.

The process of collecting data and writing the case study can last anywhere from a few days to as long as ten days. We have tried lengths from three to seven days and have found that we always get everything covered, but never as well as we would like. We think the case study activity can be made to fit the available time; the important thing is to keep it active. Again, we want to stress that the focus is on the process of the activity, not its product. We try to use training activities where participants learn by doing, by discovering for themselves, not by being told. We want to give them a chance to experience participatory education so that the trainees will be better able to provide similiar experiences for learning group facilitators. Also we believe that this training method will give the participants a chance to see village learners in a different light: as sources of knowledge and an aid to the participants. We hope that such a perspective will be carried by the peniliks back to their posts and be helpful in their work.

More on Training Activities

The case study approach is designed to get trainees out of the classroom and into the field; to reinforce classroom concepts on NFE; to increase research and analytical skills of the traineees; and to put trainees through a series of participatory activities which they could then use in their own work. In writing a case study trainees prepare questionnaires; use the questionnaires to interview learners; take an inventory of collected data by using the questionnaire as a list of categories; and use the questionnaire as the outline for the case study by going systematically through the inventoried data and writing it up in a prose report style.

The questionnaires are based on the PENMAS Ten Characteristics. PENMAS uses these characteristics to describe and evaluate learning groups which

are the focus of the training. Therefore all peniliks are familiar with the characteristics and they are a good basis to work from in developing questionnaires.

We will now return to the steps which were outlined earlier and fill them in. For each step the discussion will present the key ideas, suggest some training activities, and describe some of our experiences.

1. Discussion of the Case Study

In this step the participants are given a case study to read and they are divided into small working groups to discuss the case study. The small groups try to develop a list of criteria which characterize a good case study. The small groups then present their criteria to the whole body of trainees for discussion. Finally the general group agrees on a few key criteria to be used as a short list to evaluate case studies. Some of the criteria suggested by trainees include the following:

A good case study:

is short	keeps to the point
tells a story	intends to inform
describes a real situation	is revealing
is systematic	searches out problems
is easily read	can teach us

The above activity is usually followed up by having a trainer discuss some uses of a case study in order to help the trainees further define what is meant by a case study.

The basic objective of this first step is to introduce the participants to the idea of the case study and to provide them with some reasons for using the case study.

"Tell me, Mr. John, how can I use a case study?"

Often this question comes up early in the process and it is important that participants understand that there are many uses of the case study including such things as: a training tool, a report format, a learning method, a problem-solving tool.

Wherever possible, participatory training activities are used. In addition to small working groups which brainstorm criteria and large group discussion, there are many other possible activities.

> Our group felt that the most important aspect of a case study was that it searches out problems. We listed several criteria to use for evaluating a case study, but in the end, for us only one was important and when we ranked our criteria we listed only this one: A good case study searches out and studies problems.

As a result of the first step of the case study process, the trainees will have experienced brainstorming, a ranking process to select criteria appropriate for evaluating a good case study (taken together these two become the Nominal Group Technique), and small and large group discussions. The trainees will have produced a list of criteria that can be used to evaluate case studies, and have thus begun to make use of some evaluation concepts.

2. Develop a Format for Collecting Data

The objective of this step is the design of a simple questionnaire which can be used by the trainees in their field practicum. We also try to give trainees some experience in using their questionnaires to conduct interviews.

In small working groups, typically five groups of five to eight trainees, trainees work on developing a set of questions which can be used to produce data concerning each of the Ten Characteristics. Each small group is given two of the Ten Characteristics for which to develop a set of questions.

> In a corner of one of the offices at the training center a group of trainees have gathered to make a list of questions which can be used to analyze their two characteristics. They begin a serious discussion covering what a case study is and how the characteristics for which they are developing questions fit into a case study. One of their characteristics is the learning group, for which they list the following questions:
>
> 1. What steps were followed in forming this learning group?
> 2. When was this group formed?
> 3. How many learners are there (men/women)?
> 4. Who is the tutor, what is the tutor's work, what is the tutor's educational background?
> 5. What kind of learning group is this?

In a large group trainees discuss the questions they have developed for the characteristics and the group in general makes suggestions and comes to consensus on the questions to be used on their questionnaire. The last activity of this step is a role play in which trainees use the questionnaire they have developed and conduct interviews with learners.

The role play is usually preceded by a discussion of how to conduct an interview. Then facilitators guide small groups through role plays giving

each group member a chance to act as an interviewer. As "interviewers" are changed the Facilitator invites the group doing the role play to critique "interviewers" techniques.

Everyone should have an opportunity to develop a questionnaire and see how that questionnaire gets used to collect information. We want the peniliks to be able to do this once they are back in the field should their work require it. They gain this skill in the context of preparing to write a case study. Thus they learn a new skill and are asked to apply it at the same time.

3. Collect Information

At this point the training activity moves to the field. The trainees spend two or three days in a village to do their research. The first of these days usually involves meeting local officials and being introduced around the village. This is an important day during which the trainees begin to get an overall idea of the village, how life is carried on there, and what officials are doing and planning to do to help the village.

The village visitation takes some advance planning. The logistics of food, places for people to sleep, electricity, materials, learning groups available for study and willingness to be studied all have to be taken into consideration. Although normally arranged by the local PENMAS penilik, we have found it necessary to check on how preparations are progressing before sending trainees to the village.

We once took a group to a village to do case studies. There were about fifty participants and we had been told that there were plenty of learning groups willing to be studied. We discovered on our arrival that there was only one learning group in the village. The prospect of fifty trainees interviewing ten learners didn't seem to be productive. As an alternative, the trainees were divided into several groups and each group was asked to study a different aspect of the village. One group did a demographic study, another did an economic study, another looked into learning needs and the possibilities of forming more learning groups, and one group did indeed get to do a case study. We learned from this to be sure to do our advance planning, but we also learned that being flexible helps. Although not all participants wrote case studies, they all did some field research and got to experience both active participatory learning and villagers as their helpers not as their targets.

> "We got together with the learning group that we were asked to study and began to get to know them after prayers last night. We plan to do some interviewing today, but felt that last night was for getting to know each other."

There are several ways that groups can be divided up to carry out interviews. Sometimes one working group gets together with a whole learning group. However, this can be confusing as everyone likes to talk. Having all of those government officials in one room at the same time can also be intimidating to the villagers. It is probably better to break up both trainee working groups and learners so that you have one or two trainees with two or more learners.

> "One training group had five trainees asking questions of two learners. That seemed a little awkward and they weren't getting any answers. It was suggested that two trainees were enough to do the interview and sure enough the trainees later said that with fewer trainees they got more answers."

Ideally there would be only one trainee to a learning group, but because groups of trainees are so large and there is continued pressure to train only in large groups, compromises are necessary.

The time that trainees can actually spend interviewing learners and facilitators is limited. In order not to interrupt the learners' daily routines, interviewing is usually done in the late afternoon and early evening when work is usually over and there is time that is often set aside by the villager for social activities. Trainees usually spend their mornings reflecting on the previous evening's interview and (here is where the steps overlap) taking inventory of collected information. When learners are available then more interviews take place.

4. Analyze Data

While in the village, the trainees can both collect the data and begin the process of inventorying it. There is time for both to be done and it gives trainees a chance to see how collected data can be inventoried. Once a person knows what it means to inventory their information, they are usually able to collect it in such a manner as to make the taking of inventory easier. Thus these steps go together well.

Taking an inventory of the information means collecting the answers to the questions and writing out a comprehensive answer to each question.

At the "Peoples Center" in Bojo Village one of the working groups of trainees is going over the information they have collected concerning the Lotus Learning Group. On a piece of newsprint they write out the questions pertaining to "Learning Group" and then they discuss the information that each of them has collected that relates to the "Learning Group" questions. Finally, they write out collective answers to each of the questions on the newsprint. When they are finished the newsprint has the following written on it:

1. What steps were followed in forming this learning group?

   This learning group, the Lotus Group, was formed in response to the learners demands by the learners, the penilik, and the local government."

2. What kind of learning group is this?

   "The Lotus Group is learning sewing skills."

3. When was this group formed?

   "The Lotus Group came into being two months ago."

4. How many learners are there (men/women)?

   "There are eleven learners in the group, all of them are women."

5. Who is the tutor, what is the tutor's work, what is the tutor's educational background?

   "The tutor is Mrs. Arifah who is 32 years old and is a skilled seamstress who makes her living sewing women's clothes. She finished her middle level schooling. She lives in another village, but is able to meet with the group twice a week in their village."

Other Information.

"The eleven learners had to pay $6.50 to become members of this group. This money was used as capital to purchase cloth and other necessary sewing articles. Each person pays $1.25 per month to remain a member of the group."

During this step the collected information should be reflected on in relation to any problems mentioned by learners or in relation to any possible problems that might come up.

"I think that Lotus Group has two potential problems. The tutor is some distance away and is not easily available to help the learners. Also each learner must pay to be a member. What happens when they don't have the monthly dues?"

Such statements and or questions can be written into the case study and if there are answers to the questions, they too should be included.

Analysis is very difficult. It is hard even for those who have had lots of practice. During this step analytical questions which were not asked on the questionnaire should be brought up in discussion and considered. The participants should discover that there is more to a case study than just description. Analysis and the act of asking analytical questions will help the penilik do a better job. He or she will be better able to go about solving a problem, getting at its root, and then beginning to work on a solution. Analysis is not foreign to anyone, but often its conscious cultivation is. The case study process can be used to give people practice in developing their analytical skills.

5. Write the Case Study

The case study can be written either in the field or in the classroom. The information inventory produced in the last step must now be incorporated into a prose report.

> One of the people working on the Lotus Group wrote the following passage on the learning group section: The "Lotus Group" was formed two months ago by the learners, the penilik, and the local government to meet the demands of the learners. There are eleven women in the group and they are learning how to sew. In order to buy equipment and cloth each learner had to pay a membership fee of $6.50 at the start up of the group and each member must pay $1.25 each month as dues.
>
> The tutor is Mrs. Arifah who is 32 years old and is a skilled seamstress who makes her living sewing womens' clothes. She has finished middle level school. She lives in Pare-pare and not Bojo.

Thus what was developed as a questionnaire serves as a structure for the case study. Each question is answered as the information is collected in the field and than an inventory is made. Then, based on the inventory, the case study is written. If the questionnaire was well organized then the case study will be clear (i.e. both logical and well organized). PENMAS' Ten Characteristics of learning provide this case study process with a good structure, but other frameworks can be developed as well. Readers should study their own organizations as a source of ideas for a model that can be used as the basis for a format in writing a case study.

6. Analyze the Case Study Process

This step takes place in the classroom and consists of two activities. Trainees present their case studies to the group at large and they discuss and critique those case studies based on the criteria developed during the

first step of the training process. The objective of this activity is to give feedback to each group about the case studies which they have written and to show the participants how criteria can be used as a basis for evaluation.

The second activity consists of a dialogue in which trainers and trainees discuss the process of writing a case study and trainees are given a chance to comment on the activities they have experienced while producing a case study. The objective of this activity is to review the case study process and if possible generalize it by discussing how a case study of a management problem or business might be written. Trainers usually get participants to propose what kind of questions might need answering in order to write such case studies.

Summary

> "We have had several other training experiences, but this has been the most enjoyable and the most informative. I think that I know what a case study is and that I could train someone else in how to write one. The activities we went through will also be useful in training people. . . . Let's not go back to only lectures."

A trainee said this to us on the last day of one of our training workshops. Statements like his form a part of the evaluation process. In this section we would like to disucss the kind of evaluation which has been done and what we have found to be some of the advantages and disadvantages of our case study process.

We found that evaluation can be done easily by a system of testing or discussions. We tried to rely on a procedure in which we divided the participants into small discussion groups and put a member of our training staff with each group. These groups remained permanent and our staff remained with their originally assigned groups. Each group met in the evening for 15 to 20 minutes and discussed what happened during the training that day. Each member of a group including the staff member was to answer the question "What was the most important thing that happened to you during training today." See Technical Note #17 in this series entitled "Participatory Communication in Nonformal Education" for a discussion of this method in more detail.

Our objective in using this method was to find out what trainees liked/disliked about training and what they thought were the most important things going on in training. Later our staff would meet and discuss what their groups had to say, and then try to see if there were any suggestions that might help the training. The procedure is simple, but very useful for improving our training. We also found that this process helped to maintain good trainee relations.

Advantages and Disadvantages

Our experience has suggested a number of advantages and disadvantages in using the case study process. The following list reviews several of the most important ones.

Advantages:

1. Participants are able to experience several participatory training techniques which they can then use in the field. Among these techniques are: brainstorming, role playing, nominal group technique, group discussions, and dialogue. Although this is not a tremendously long list, trainers feel it important as the peniliks have never before been exposed to such techniques and, according to feedback received during training, nearly 80 per cent of the trainees feel they are capable of using them in the field.

2. Not only are participants exposed to the above techniques, but they experience them in the context of a very participatory setting. The training staff think this is important as it gives trainees an idea of how to use the activities in the field when training others.

   > "We haven't just taught someone about a technique, we have given them the opportunity to experience it."

   Staff members think trainees will be able to replicate the experience for others.

3. Village learners become resources for learning. In the experience of most peniliks, learners are not often thought of as resources from whom the peniliks might learn. In the field practicum, peniliks must learn from the learners. "It was a new way of learning for me," said one trainee. Trainers believe that the exercise will help the peniliks to sympathize better with learners and possibly see things from the point of view of the learners.

4. Trainees leave training with a product. The written case studies that are produced by the peniliks are something they can point to with a sense of achievement after their training is over.

5. The case study activities give the trainees a chance to apply classroom theories. Before the field exercises, trainees are introduced to participatory training concepts, learning needs assessment techniques, and evaluation methods. In the case study exercises the trainees

either apply these things (they evaluate case studies based on criteria; do interviews; make research instruments; etc.) or experience their use (they experience a variety of training techniques).

6. Information gained in the field visitation can be used in other exercises such as program planning and materials development. Trainees come away from their field visitation knowing exactly what the needs of at least one learning group are regarding learning materials. During further training they can try to develop some materials to fit those needs.

7. The product of the case study process can be useful to the local penilik and the learning groups. "We always try to give the local penilik feedback regarding his program. If we see ways that it can be improved we make suggestions. Also the tutors and learning groups benefit as they often have a chance to read the case studies about their groups and we try to make what suggestions seem valuable for them."

Disadvantages:

1. There were often problems in the field visitation segment (poor preparation and cooperation) due to distance and inexperience. The inexperience was soon gotten over by the center staff, but field staff varied in ability which caused such problems as:

   a. The previously mentioned occurrence when fifty trainees arrived in a village to study one learning group.

   b. Food preparation was difficult at one site because there were few foodstuffs that could be purchased locally and the penilik had failed to mention this to center staff.

2. The case study process works best if the size of the group to be trained is not too large.

   "It would be better if the group size were small. A maximum of twenty trainees would be very nice. Too often we scare a village when fifty of us appear to carry out a field practicum."

3. Trainers should have some experience of what a case study is and of participatory training techniques. Not all of the trainers knew what they were doing when we first started using the case study exercises, and they felt this a handicap to the success of the training. However, after following a master trainer for a workshop, they were able to take over much of the training.

4. The exercise takes some equipment. Typing and duplicating machines as well as operators are necessary if participants are to have copies of such things as questionnaires, criteria lists, etc. These things could be written out long hand, but trainees enjoyed being able to take home typed copies of the case studies that they produced.

5. The field visit depends on the hospitality and openness of the village people as well as a good relationship between government and the people. This has been no problem for us, but we imagine that it could be.

In sum the case study proved very useful to us. The trainees leave training feeling satisfied that they have learned skills useful to them. Trainers and trainees enjoyed the process. In meeting one objective, producing a case study, we served several others.

> "We enjoyed your presence (Pemmas peniliks) in our village. We think that you have left us with more, that is your good advice and help, than you have taken with you."
>
> A Village Learner

> "Training like this is fun, challenging, and informative. I have learned a lot during this process."
>
> Training staff member

> "This has been a very useful training for me. I have learned a lot. I can train people using better techniques which they will enjoy and I have experienced several things that help me to see learners in a different way."
>
> A penilik

APPENDIX

The following is the questionnaire that was used to obtain the information in the case study at the beginning of this note. The questionnaire has been included in this note so that the reader can see how it provides the outline for the case study and how it determines what information will be in the case study. As the case study in the body of the note is somewhat truncated, not all of the information sought by the questionnaire is in the case study. However, comparison of the two shows how the one is derived from the other.

Questionnaire

I. Learning Group:

A. Who wanted this learning group formed?
B. How was the learning group formed?
C. What kind of learning group is this?
D. Who is the leader of this learning group?
   -name
   -work
   -education
E. When was the group formed?

II. Learners

A. How many learners are there?
   -How many started?
   -How many now?
B. How many men? How many women?
C. What kind of work do the learners do?
D. What is the average age (or age range)?
E. What is the average level of formal education?
F. Where do the learners come from?
G. What are the learners' stated learning needs?

III. The Learning Place

A. Where does the group meet and who owns the place?
B. Who is responsible for looking after the place?
C. Is rent paid or is the place free?
D. What facilities are present?
E. Does the place meet the needs of the group?

IV. Learning Activities Program

A. What is the group learning?
B. How many times a week does the group meet?
C. What types of learning methods are being used?

V. Support for Learning

A. Who is on the committee that supports the learning group?
B. What is their background? (work, education, address)
C. What does the committee do to support the learning group?

VI. Learning Resources

A. How many people have acted as learning resources for this group?
B. Who? (education, age, work, names, addresses)
C. What kinds of skills do the resources have?
D. Is there any pay for the learning resources?
E. Have the resources received any training for their roles?

VII. Learning Materials

A. What kinds of learning materials have been used?
B. What plans are there for using other kinds of learning materials?

VIII. Learning Motivation

A. What has stimulated learners?

- tutor
- place
- environment
- learning activities
- discussion topics
- free education
- free materials
- gifts
- certificates of completion
- skill contests
- uses of new skills

IX. Financial Support for Learning

A. How much financial aid has been received?
B. From where did it come?
C. What has the aid been used for?
D. How has the aid been managed?
E. How has the aid been administered?

X. Results of Learning

A. How many learners have finished the program?
B. What have those learners been doing since leaving?
C. Are people using the skills they learned?
D. Is there a promotion effort to increase learner membership?
E. Is there a program to employ ex-learners?

TECHNICAL NOTES OF THE CENTER FOR INTERNATIONAL EDUCATION

1.	The Ecuador Project	-	Discussion of basic goals, philosophy, and methodology of a rural non-formal education project.
2.	Conscientizacao and Simulation Games	-	Comments on Paulo Freire's educational philosophy, and discussion of the use of simulation games for consciousness raising.
3.	Hacienda	-	Description of a board game simulating the economic and social realities of the Ecuadorian Sierra. (Also known as "The Game of Life")
4.	Mercado	-	Description of a Market Rummy card game which provides fluency practice in basic market mathematics.
5.	Ashton-Warner Literacy Method	-	Description of a modified version of Sylvia Ashton-Warner's approach to literacy training used in Ecuadorian villages.
6.	Letter Dice	-	Description of a letter fluency game which uses simple participation games to involve illiterates in a non-threatening approach to literacy.
7.	Bingo	-	Description of Bingo-like fluency games for both words and numerical operations.
8.	Math Fluency Games	-	Description of a variety of simple fluency games which provide practice in basic arithmetic operations.
9.	Letter Fluency Games	-	Description of a variety of simple fluency games which provide practice in literacy skills.
10.	Tabacundo: Battery Powered Dialogue	-	Description and analysis of the impact produced by a recorder, such as feedback and techniques in programming, in a rural Ecuadorian radio school program.
11.	The Facilitator Model	-	Description of the facilitator concept as promoter of community development in the rural Ecuadorian area.
12.	Puppets and The Theater	-	Description of the use of theater, puppets and music, within the context of an Education Fair, as instruments of literacy and consciousness awareness in a rural community.
13.	Fotonovela	-	Description of the development and use of the fotonovela as an instrument of literacy and consciousness awareness in the community.
14.	The Education Game	-	Description of a simulation/board game that illustrates the inequities of many educational systems.
15.	The Fun Bus	-	Description of an NFE project in Massachusetts that used music, puppetry, and drama to involve local people in a series of workshops focussing on town issues.
16.	Field Training Through Case Studies	-	Description of how Indonesian community development workers produced actual village case studies as a part of their training program.
17.	Participatory Communication in Nonformal Education	-	Description of the use of simple processing techniques for information sharing, formative evaluation and staff communication.

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